

Program Overview: Client reporting is a critical element of effective client relations. This program describes minimum reporting requirements; including frequency and types of information to be report to clients and customers. It is critical that we establish and maintain productive lines of communication with the individuals we serve.

- It is essential that we take advantage of the opportunity to report on our performance to our clients and constituents we serve. We need to remind the individuals who can influence our contract retention that we are supporting their needs and complying with our obligations.
- The client reporting program consists of two primary requirements.
 - **Monthly Reports:** These reports should refer to our past performance, upcoming objectives, and demonstrate our understanding of the day-to-day requirements of our responsibilities. Monthly Reports should be provided to the client by the 5th of each month.
 - **Joint Review Committee (JRC) reports/presentation:** The JRC process provides a forum for the company's senior leadership and our clients to meet and discuss commitments made during the sales process, past performance, future objectives and efforts to support our client's business model. It is strongly suggested that the JRC is based on a Quality Enhancement Plan. JRC meetings and accompanying reports should be scheduled on a quarterly basis.
- The following pages are designed to provide guidance how to develop effective reports and define the appropriate frequency for the delivery of these reports.

A. Monthly Reports

- At the beginning of each month, account managers are required to provide our clients with an update on the activities from the prior month and insight to activities for future months. The monthly report serves as a communication tool to create a historical record of our program's evolution. Historical records are critical to our long terms success.
 - Historical records of the contract's evolution help support account retention. We cannot count on the client who hired us to remain in his/her position forever. When our clients are backfilled, our new client will likely review the budgets he/she is managing and possibly question the perceived value of the contract. The hiring client will be leaving with the historical knowledge of why we were originally hired and the efforts it took to create a successful program. ***(The pain that existed when we were hired will be gone – we will have fixed it)***
 - If the program appears to be running well when a new client assumes responsibility, our contract may appear to represent an unnecessary premium. ***(New clients typically will be looking to identify cost savings opportunities and ways to demonstrate that their boss made a good decision by hiring them)*** Recording the evolution of our program, via Monthly Reports, is one tactic that needs to be implemented to protect the retention of our contract.

The monthly report should focus on day-to-day service delivery (contract compliance).

Guidelines to creating a Monthly Report

1. Deliver the monthly report to the client by the 5th of each month.
2. Include before and after pictures, graphs and other illustrations when possible.
3. Monthly Reports should be written on the company Letterhead, or the like.
4. Have a member of the team proofread reports prior to submission to the client.
5. A list of recommended topics is listed directly below. Feel free to add other relevant information to suit the needs of the client.
 - a. Some of the departments identified in the list below may not be relevant for all our units – *please only report on the departments within the scope of our contract.*
 - b. It is important that topics of the monthly report are as consistent as possible with the list below. This consistency allows the senior leadership to compare the performance between units and provide the greatest level of support.
6. Sample Monthly Reports are available upon request.

Recommended Monthly Report Topics

Financial Summary – related to client funds that we manage (*If we do NOT manage client funds this section should be excluded - Do not report company financial performance to clients*)

- Actuals versus budgets

Custodial Summary

- Work order statistics
 - Events support and associated time
- Projects completed (out of norm activities)
 - Third party sub-contractor
- Training completed (Technical / Safety / Policy / Etc...)
- Challenges
- Future Initiatives

Grounds Summary

- Work order statistics
 - Events support and associated time
- Projects completed (out of norm activities)
 - Third party sub-contractor
- Training completed (Technical / Safety / Policy / Etc.)
- Challenges
- Future Initiatives

Maintenance Summary

- Work order statistics
 - Work Orders received vs. completed for the period
 - Aging report
 - Self-generated corrective Work Orders
 - PM completion
- Projects completed (out of norm activities)
 - Third party sub-contractor
- Training completed (Technical / Safety / Policy / Etc.)
- Challenges
- Future Initiatives

Recommended Monthly Report Topics (continued)

Utilities

- Invoice summary
- Consumption summary
- Cost Saving Measures

Quality Assurance

- Monthly Report Cards
- Customer Survey Results

Corporate Support

- Visits by corporate support personnel
- Company news
- New programs

B. Joint Review Committee (JRC) – Report / Presentation

- Each quarter, account managers are required to host a JRC meeting and present a quarterly report to our client and key constituents. The JRC program is designed to facilitate routine communication between the company's Senior Leadership and key client(s), assuring synchronization between both organizations.
 - JRC meetings and reports are often simply the consolidation of the previous three monthly reports. This approach to the JRC process is often effective when the JRC client attendees represent a wider audience than the distribution of the original monthly reports. If the audience for the JRC and monthly reports are identical, simply repackaging the same data will likely end the client's willingness to participate in the JRC process.
 - *Ideally, the JRC process is an opportunity to enhance strategic relationships and focus the conversation on defining client expectations. The ideal JRC meeting and report should focus on the company's efforts to support our client's strategic plan, mission and initiatives. The Quality Enhancement Plan (QEP) lends itself to this objective. The QEP can be utilized as a platform to organize and structure the JRC process. [Please refer to the SOP related to the development of a Quality Enhancement Plan*
 - Developing a QEP can be a challenging process. Please involve others as necessary.

The JRC report should focus on performance results, account retention and identifying future objectives

Guidelines to creating a JRC Report / Presentation

1. Include before and after pictures, graphs and other illustrations when possible.
2. JRC Reports/Presentation should be written on the company's JRC Point Template.
3. Due to the various reporting needs and business models of our clients, The QEP is strongly recommended as a tool to manage the JRC process. The QEP process provides the company's Regional Managers with a tool where they can proactively define measurable outcomes that are directly correlated to customer satisfaction.
 - The first JRC Meeting should focus on two primary objectives.
 - Review Startup
 - Establish a Quality Enhancement Plan (QEP) with the input of the client(s)
 - The QEP if managed effectively will provide the following benefits:
 - Clear understanding of client's expectations
 - Clear understanding of how the company supports our client's mission
 - Proactively defining success
 - Establishing a strategic relationship with client(s)

***The core of the QEP is a relatively simple question, "what can we do to support your success". We need to understand how all our constituents would respond to this question.**